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ABSTRACT

This report presents the results of a survey of New Zealand principals whose schools had recently undergone an Education Review Office (ERO) study in 1995-96. A total of 602 principals responded to the survey. A comparison of school characteristics indicates good representation, with some slight underrepresentation of city schools and other inconsistencies. Results show that only 1 percent of the principals had no previous experience of an ERO review. Most of the reviews reported by principals were assurance audits, and 66 percent of the principals felt they were well-informed about what records or data would be required by the ERO team. The smaller the school, the more likely it was for the principal to feel poorly informed. Only 2 percent of the principals spent no additional time preparing materials for their schools' ERO reviews. The ERO review teams were typically composed of two members, and most of the principals thought that their review teams conducted the review in a highly professional, balanced, and fair manner. Forty percent of the principals believed that their review team had sufficient knowledge of current curriculum practice and management. Principals also noted that the ERO review was a stressful experience and expressed concern about its disruption of school life. Appendices contain the survey questionnaire and a table of survey responses. (RJM)

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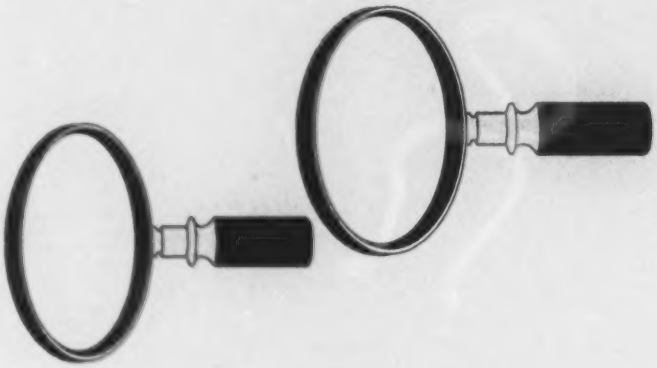
PRIMARY PRINCIPALS' EXPERIENCES OF ERO REVIEWS

1995–1996



CATHY WYLIE

A Report for the New Zealand Principals' Federation
by the
New Zealand Council for Educational Research

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1995–1996

Cathy Wylie

New Zealand Council for Educational Research
Wellington
1997

New Zealand Council for Educational Research
P O Box 3237
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Background

In the third quarter of 1996, the New Zealand Principals' Federation asked members whose school had had an Education Review Office (ERO) review in the past year to respond to a questionnaire (Appendix 2). The questionnaire was designed by the NZ Principals' Federation and the New Zealand Council for Educational Research was commissioned to analyse and report the results.

ERO figures for the 1995–1996 financial year give a total of 575 assurance audits carried out in primary schools, 314 effectiveness reviews, and 131 discretionary assurance audits. The figure for effectiveness and discretionary reviews does not give the school types. Six hundred and two principals responsed to this survey. Comparing their school characteristics to the national figures (Appendix 1), we find that they provide a good representation, with some slight under-representation of city schools, a slight under-representation of schools with rolls between 21 and 60, some over-representation of schools with medium Maori enrolment, and, conversely, some under-representation of schools with medium-high Maori enrolment. We have no breakdown of ERO reviews by school characteristics, and thus we cannot tell whether the differences between the survey responses and the national figures are related to responses or to the profile of schools reviewed by ERO.

The differences are not substantial, however, and thus the answers given by principals in this survey allow us to provide a sound picture of what impact the process and results of ERO reviews have on New Zealand primary schools; and whether the impact varies according to the following variables: school characteristics such as location, size, socio-economic status of the school community (as measured by the Ministry of Education's decile rating), whether the principal is a teaching principal, the principal's previous experience of ERO reviews, whether or not the school undertakes its own self-review, and by the composition and source of the ERO review team. Only differences in answers which have less than 1 in 20 chance of having occurred by chance are reported.

Previous Experience of ERO Reviews and School Self-Review

Only 1 percent of the principals had no previous experience of an ERO review. Fifteen percent of the principals responding had experience of just 1 review, but most had experience of 2 or more: 68 percent had experience of 2 ERO reviews, 15 percent 3 ERO reviews, and 1 percent 4 or more. The question was worded "How many ERO Reviews, either Assurance or Effectiveness, have you had in the last 4 years?" and thus the answers may refer to their experience as teachers as well as principals and their experience at schools other than their present one. Principals of schools in small rural townships and remote rural areas were more likely than others to mention experience of 3 or more reviews (23 percent and 25 percent respectively).

The majority of primary principals, 85 percent, also carry out their own review of the school at least once a year. This was most common in large schools with rolls of 350 or more (92 percent). Principals in schools served by the Wanganui ERO office were least likely to carry out their own self-review (30 percent).

Form of Review

Most of the reviews reported by principals responding to the survey which had occurred at their school over the previous year were assurance audits (62 percent). The 1995–1996 ERO annual report describes these as ". . . based on an examination of the extent to which governing/managing bodies are meeting their obligations and requirements, including the quality of service delivery". (p. 39). A third of the schools had had effectiveness reviews, which "comprises evaluative reporting on student achievement and school-based factors affecting this . . . to illustrate the difference made to students' educational achievement by the school involved". (ibid, p. 43), and 5 percent had had discretionary assurance audits, which "may be provided after assurance audit reports which disclosed poor performance or areas of concern . . . [and] address the areas of non/poor performance". (ibid, p. 39). One principal had also initiated an ERO review of the school.

There were no relationships between school characteristics and the occurrence of assurance audits, but there were some differences related to discretionary and effectiveness reviews.

Discretionary reviews were most likely to be carried out in rural schools (9 percent) and least likely to be carried out in city schools. Ten percent of grade 1 (G1) principals had experienced a discretionary review in the past year (compared to 7 percent of G2 principals, 3 percent of G3 principals, 1 percent of G4, 5 percent of G5, and no G5+ principals). Thus teaching principals were more likely to report them than non-teaching principals (6 percent compared to 2 percent).

Schools with mid to high levels of Maori enrolment were most likely to receive discretionary reviews; but there was no difference between high and low Maori enrolment schools. Nor were there any differences between high and low decile schools.

Fifty-four percent of the principals of schools which had discretionary reviews had had 3 or more ERO reviews over the last 4 years compared to 15 percent each of those whose latest review was an assurance or effectiveness review.

The ERO offices most likely to carry out discretionary reviews were Auckland, Rotorua, Wanganui, and Nelson.

There were also some differences between ERO offices relating to the proportion of schools reviewed which had *effectiveness reviews*. Effectiveness reviews seemed least likely to occur in Christchurch (19 percent of schools served by this office), compared to the group of offices where between 25 and 33 percent of the schools reviewed had had an effectiveness review (Nelson, Napier, Dunedin, Wanganui, Auckland, and Whangarei), and a group giving effectiveness reviews to around 40 percent of schools in the area being reviewed (Wellington, Hamilton, and Rotorua).

City and large-town schools were more likely than others to have effectiveness reviews (40 percent compared to 27 percent of rural schools and schools in rural towns, and 20 percent of schools classified as remote). Thirty-nine percent of non-teaching principals had had an effectiveness review compared with 28 percent of teaching principals. Schools with rolls of less than 60 were least likely to have had an effectiveness review (19 percent compared to 33 percent of schools with 61–160 students, 36 percent of those with 161–240, and 40 percent of schools with rolls over 240).

The greater proportion of city schools receiving effectiveness reviews may reflect previous ERO cycles, or, possibly, the funds available for ERO reviews. Effectiveness reviews were more likely to include 3 or more ERO reviewers (42 percent, compared to 31 percent of assurance reviews, and 18 percent of discretionary reviews). To include this number of reviewers in the review of a rural

school would be more expensive. Indeed, we find that only 12 percent of the reviews carried out in rural or remote areas involved more than 2 reviewers, compared to 43 percent of those carried out in cities, 61 percent of those carried out in large-towns, and 32 percent of those in small rural townships.

On the whole, then, it seems that discretionary reviews following up on assurance audits revealing some cause for concern were targeted more toward small rural schools during 1995–1996, while city schools were most likely to receive effectiveness reviews. This difference may reflect the difficulty small schools have in covering all the ground required for an assurance audit report; it could also reflect ERO priorities.

Preparation for the Review

Sixty-six percent of the principals felt they were well-informed about what records or data would be required by their ERO team (a rating of 7–9 on the 9 point scale), with 45 percent giving a rating of 8–9. Thirteen percent felt ill-informed (1–3 on the 9 point scale), and 21 percent felt there were gaps in their information (4–6 on the 9 point scale).

The smaller the school, the more likely it was for the principal to feel poorly informed: 17 percent of those in the smallest schools, gradually declining to 6 percent of those in the largest schools. This does not reflect differences in principals' experiences of ERO reviews, but may reflect the fact that many first principalships are in small schools. There were no significant differences between teaching and non-teaching principals, or differences related to other school characteristics.

What mattered more was the type of review. Twenty-nine percent of those who had discretionary reviews felt ill-informed of the material they would need to provide their ERO team, compared to 13 percent of those who had effectiveness reviews, and 12 percent of those who had assurance audits. There was no difference between those principals who carried out their own school self-review process and those who did not.

There were some differences related to the ERO office responsible for the review. Principals served by the Christchurch and Rotorua offices were more likely to feel well-informed of what was required of them in the way of material and data (between 58 and 55 percent respectively), and principals served by Whangarei and Dunedin more likely than others to feel ill-informed (23 percent and 18 percent respectively).

The better informed a principal was about the material required for the review, the less extra material had to be gathered, and the less likely it was that a large amount of extra time had to be spent by the principal in assembling the material: only 12 percent of those who felt well-informed spent more than 50 hours assembling the material compared to 27 percent of those who felt ill-informed.

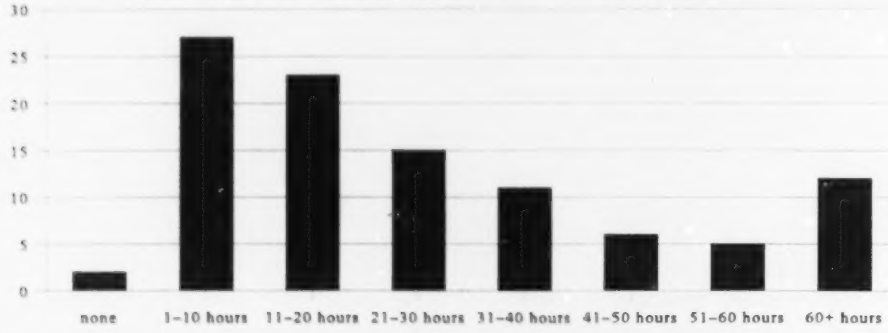
Time Costs of Preparing the Data requested by ERO

Only two (2) percent of the principals spent no additional time preparing the material for their school's ERO review. An estimate of the average time spent by principals preparing this material is 26.6

hours.[1] This would not cover the full time required of school staff and their board of trustees. Figure 1 gives a breakdown of the hours needed to meet ERO requirements.

Figure 1

Principal Time Given to Prepare Records or Data for ERO Review



School characteristics made no difference to the amount of principal time needed to furnish the material required by ERO.

Twenty-five percent of the principals who responded said they had had to compile a lot of extra written information and data (8–9 on the 9 point scale), another quarter a good deal of extra data (6–7 on the 9 point scale), another quarter a fair amount of extra data (4–5 on the 9 point scale), and the final quarter felt they had had to assemble little extra written information or data for the ERO review team. Forty-three percent of the principals who had to assemble a lot of material for their review spent 50 hours or more extra time compiling the material, compared to 3 percent of those who had had to assemble very little or no extra material.

Principals of remote schools were most likely to report the need to compile a lot of extra information and data (37 percent). There were no other links with school characteristics, nor was it linked with the type of review. Principals who had experienced more than 1 review were more likely to report they needed to compile a good deal of extra data.

Access to Staff Appraisal Records

There was some controversy in 1996 when it emerged that ERO reviewers were asking for staff appraisal notes, though staff appraisals had been carried out on the basis that they were confidential to people involved in the appraisal process. Sixteen percent of the principals had been asked to give ERO reviewers access to such notes, and 78 percent of those asked had given these notes to the ERO review team. Principals were not asked if the staff whose notes they were asked for had participated in appraisal on the basis that the appraisal process was confidential. Perhaps in these schools the process was not confidential, since the majority of principals (79 percent) said they would refuse to give an ERO team access to appraisal notes from a process staff had thought confidential, with only 3 percent offering total access.

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[1] This estimate was derived by taking the midpoint of each category of hours (for example, 5 hours for 1–10 hours, 15 hours for 11–20 hours and so on, using 70 hours for the category of 60 hours or more, multiplying by the number of responses in each category, and then dividing the total number of hours by the total number of survey respondents.

The answers to questions relating to whether or not principals had been asked for staff appraisal data and whether or not they would give it did not differ with school characteristics or the kind of review. But different offices did seem to be asking for such information: 33 percent of those reviewed by the Dunedin office were asked for staff appraisal details, while very few in the Wellington or Wanganui offices were asked (3 and 5 percent respectively). Schools whose final review report was judged by the principal to be extremely negative[2] were more likely than others to be asked to provide the results of staff appraisals (27 percent compared to 11 percent of those whose final reports were extremely positive).

The ERO Team—Size and Composition

Eleven percent of the principals said their ERO review had been conducted by a single reviewer. It was most common for principals to report review teams of two (55 percent of principals). Twenty-one percent of the principals reported teams with 3 members, 11 percent with 4 members, and 2 percent with 5 or more members.

Single reviewers were most likely in schools with rolls less than 60 (29 percent), in schools in rural areas (24 percent), and in schools with teaching principals (18 percent). Schools in decile 1–3 schools were unlikely to have a single reviewer (2 percent compared to 12 percent of decile 4–7 schools, and 16 percent of decile 8–10 schools), and most likely to have teams of 3 or more (50 percent compared with 32 percent of decile 4–7 schools, and 22 percent of decile 8–10 schools).

A similar trend is evident in relation to a school's Maori enrolment proportion, with the percentage of principals reporting 3 or more reviewers rising from 17 percent of schools with low Maori enrolment to 45 percent of those with high Maori enrolment.

Effectiveness reviews were most likely to have teams of 3 or more reviewers (42 percent), compared with assurance audits (30 percent), or discretionary reviews (18 percent).

The ERO office responsible for a given school's review was also associated with differences in the number of reviewers in each team—a third of the Christchurch office's reviews were done by 1 person only, and less than 3 percent of the reviews by the Whangarei, Wellington, and Rotorua offices. Conversely, 3-person teams were most likely to be reported by principals served by the Rotorua and Wellington offices (60 percent and 63 percent respectively), and least likely by principals served by the Christchurch, Dunedin, and Nelson offices (3, 13, and 12 percent respectively).

While these differences may indicate differences in the profile of schools served by each office, they may also indicate some district office differences in ERO processes or resources available for reviews.

What about the review team's ethnic composition, and their awareness of the school's particular character and needs?

Only 15 percent of principals responding found their review team's ethnic composition inappropriate for their school. Not surprisingly, the proportion of those who found this so rose with the proportion of Maori enrolled in a school, from 6 percent of principals of low Maori-enrolment schools to 30 percent of principals of high Maori-enrolment schools.

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[2] Principals' assessments of their school's ERO report are given in Figure 2, p. 12.

Principals of low-decile schools (62 percent of which were high Maori-enrolment schools) were also more likely to find the ERO team's ethnic composition inappropriate for their school (28 percent compared to 12 percent of mid-decile schools, and 5 percent of high-decile schools). Principals of schools in large towns were also more likely to want a different ethnic composition in their school review team (22 percent), as did those in grade 4 and grade 5+ schools (23 percent and 21 percent respectively), and non-teaching principals (22 percent compared with 11 percent of teaching principals).

Again we see higher levels of principal satisfaction amongst those who had a single reviewer, indicating perhaps that single reviewers are carefully matched with their schools. Dissatisfaction with the ethnic composition of the reviewer rose from 2 percent of those who had had a single reviewer, to 13 percent of those who had review teams of 2 members, 20 percent of those whose review team had 3 members, and 33 percent of those whose review team had 4 members.

Principals of schools served by the 3 three South Island ERO district offices showed the most satisfaction with the ethnic composition of their review teams; and those in Auckland, Wellington, Whangarei, and Wanganui the least satisfaction (ranging from 20–26 percent dissatisfaction).

The Quality of the ERO Review Team

The majority of principals thought that their ERO review team had conducted the review in a highly professional, balanced, and fair manner (59 percent rated them 8–9 on the 9 point scale). Seven percent rated them unprofessional (1–3 on the 9 point scale), 12 percent found some lack of balance (4–5 on the 9 point scale), and 16 percent thought they were reasonably professional (6–7 points on the 9 point scale).

Principals of state schools were more likely than principals of integrated schools to rate the review team's professionalism at 5 or less (20 percent compared with 9 percent). Otherwise, school characteristics were not associated with any differences in perception of the professionalism of the review team—but the type of review was. Eighteen percent of those principals whose school had a discretionary review found the team unprofessional compared to 7 percent of those who had other reviews. Principals who did their own self-review were also more likely to rate their team as highly professional than those who did not do self-review (61 percent compared with 47 percent).

Differences in the principals' rating of the professionalism of their ERO team were also associated with different ERO offices. Principals in schools served by Hamilton, Rotorua, Christchurch, and Whangarei were more inclined to rate them as fully professional (all around 70 percent); those served by Wellington and Dunedin less inclined to describe them as fully professional (49 percent and 41 percent respectively).

There was also a trend associated with the number of reviewers on a team: the rating of fully professional dropping from 69 percent of those with a single reviewer to 53 percent of those whose review teams had 3 or more members.

Many principals who replied to the survey also felt that their review team had a consistent interpretation of requirements with relation to curriculum and policy: 41 percent gave a rating of 8–9, and 33 percent a rating of 6–7. Some inconsistencies were noted by 16 percent (ratings of 4–5), and 11 percent felt their review team had been inconsistent.

No school characteristics were associated with differences in ratings here. District ERO offices were, however. Whangarei and Christchurch were least likely to be found inconsistent (3 and 2

percent respectively attracting ratings of 1–3), Dunedin most likely to be found inconsistent (20 percent), with Dunedin and Wellington least likely to be found consistent (26 percent and 28 percent respectively).

Not surprisingly, single reviewers were unlikely to be found inconsistent (1 percent), with 11 percent each for teams of 2 or 3 reviewers, and 18 percent for teams of 4 or more reviewers. Only 23 percent of the teams of 4 were judged totally consistent in their interpretation of requirements.

Curriculum Knowledge

Forty percent of the principals responding thought that their review team had sufficient knowledge of current curriculum practice and management (ratings of 8–9 on the 9 point scale). Another 29 percent thought their team's curriculum knowledge was fair (ratings of 6–7). Seventeen percent thought this knowledge was patchy (ratings of 4–5), and 14 percent thought their review team was out of touch (ratings of 1–3).

Again, different ratings do not reflect differences in school characteristics, and the associations which exist are with ERO review teams, and with whether or not principals conduct school self-reviews. More of the latter rated their review team's curriculum knowledge as out of touch (12 percent compared to 5 percent of those who did not conduct self-reviews).

Review teams consisting of a single reviewer were most likely to attract the top rating of 8–9 (59 percent), with a decline in this rating as the numbers of reviewers increased—42 percent for 2-person teams, 33 percent for 3-person teams, and 21 percent for 4-person teams.

Twenty-five percent of the principals whose review teams came from the Dunedin ERO office thought their curriculum knowledge was out of touch and inadequate. Only 3 percent of those served by the Christchurch office thought their team's curriculum knowledge inadequate, and 57 percent thought it sufficient (ratings of 8–9).

There were no associations between the kind of review and the rating of the team's curriculum knowledge.

ERO Review Team's Understanding of the School

Thirty-two percent of the principals felt that their ERO review team had a sufficient understanding of the needs and problems of their particular school (rating of 8–9 on the 9 point scale). Twenty-eight percent found some gaps in their understanding (rating 6–7); 16 percent thought their review team's understanding was fair (rating 4–5), and 24 percent thought their team had no understanding of their school's particular situation.

Principals of integrated schools were more likely than principals of state schools to feel the ERO review team had had a sufficient understanding of the needs and problems of their particular school (46 percent compared with 30 percent).

In contrast to the replies on ethnic composition, there were no links between school characteristics and the principals' sense that the ERO review had appreciated the particular situation of their school. What we do find is that those whose schools experienced a discretionary review were more likely than others to find their review team lacking in such appreciation (32 percent)—but just as likely to give them the highest rating. We also find that differences in the district office responsible for the team are associated with some differences in ratings.

Principals served by the Dunedin, Napier, and Auckland ERO offices were more likely than others to feel their review teams did not appreciate their particular school situation (ratings of 1–3, 30–34 percent). Principals of schools serviced by the Hamilton and Christchurch ERO offices were least likely to feel their review team did not understand their particular school situation (10 percent and 13 percent respectively).

Did the ERO team understand the particular characteristics of each school, and take them into account? Thirty-eight percent of the principals felt they had been fully understood (ratings of 8–9 on the 9 point scale); 26 percent thought there were some gaps in the ERO team's understanding (ratings of 6–7); 15 percent had reservations (ratings of 4–5), and 21 percent felt their ERO team had failed to appreciate the school's particular characteristics.

Principals who carried out school self-reviews were more likely to rate their ERO team as fully understanding their school's particular characteristics (40 percent compared with 25 percent of those who did not conduct self-reviews).

Quality of Documentation Checking

Forty-two percent of the principals thought that the ERO team had adequately checked the details of the documentation supplied by their school. Twenty-eight percent thought there were some gaps in the ERO team's checking of the documentation (ratings of 6–7), 15 percent that their checking was only fair (ratings of 4–5), and 15 percent felt it was inadequate.

Again, there were no links between rating levels and school characteristics—but there were some with the number of reviewers on the team, and the ERO district office responsible for the review.

Fifty-nine percent of those principals who had had a sole reviewer thought this person had adequately checked the school's documentation, compared to 44 percent of those with a 2-person review team, 35 percent of those with a 3-person review team, and 26 percent of those with a 4-person review team.

Principals serviced by the Dunedin ERO office were again more critical, 23 percent rating their checking of school documentation as inadequate. Principals served by the Christchurch office were least likely to rate their document checking as inadequate (6 percent).

Principals who carried out their own self-review were also more likely than those who did not to report that their ERO team had carried out an adequate check of their school documentation (43 percent compared to 29 percent).

Did ERO teams spend sufficient time with students to be able to accurately verify their final report statements made about the quality of teaching and learning?

Only 15 percent of the principals thought the ERO team had done so (ratings of 8–9). Twenty-seven percent thought their coverage of students' experience showed gaps (ratings of 7–8), and 24 percent of the principals thought the coverage only fair (ratings of 4–5). Thirty-three percent of the principals thought the coverage of student experience was inadequate to support the ERO team's statements in their final report.

Principals of grade 5+ schools were least likely to find the review team's coverage of students' experience inadequate (21 percent). This was the only association with school characteristics found.

Principals of schools which had discretionary reviews were more likely than others (46 percent) to find the review team's coverage of student experience inadequate to support its final conclusions—but just as likely as others to rate it highly.

There were no links here, however, with the number of ERO reviewers on the team. The ERO office which showed some associations was Wanganui, with 46 percent of principals whose review teams came from this office finding its coverage of students' experience inadequate.

The Impact of the Review Process

There were 4 other questions which related to the process of the ERO review. These focused on the team's use of all school staff, the impact of the review on school staff and the school as it was occurring, and a further check on the principal's understanding of all that the process of an ERO review entailed.

Twenty-five percent of the principals felt that the review process had been a positive one for them and their staff (a rating of 8–9 on the 1–9 scale). Twenty-six percent felt it had been more positive than negative (ratings of 6–7), and 18 percent that it had been more negative than positive, but with some positives (ratings of 4–5). Twenty-nine percent felt it had been a negative experience (ratings of 1–3).

Principals of remote schools were most likely to report a negative experience (39 percent) and principals of the largest schools least likely (15 percent).

Thirty-nine percent of the principals whose schools had a discretionary review reported the process had been negative for them and their staff—but as before, principals in this group were just as likely as others to give the highest rating.

Principals whose schools conducted their own self-review were almost 3 times as likely as those who did not to rate the review experience positively (27 percent compared to 10 percent).

In contrast to the pattern we have reported so far, there were no associations with the number of ERO reviewers, nor with the district ERO office.

As for the effect of the review team on the school during the review itself, 27 percent of the principals reported no noticeable effect (ratings of 8–9 on the 9 point scale, 29 percent reported some effects (ratings of 6–7), 22 percent reported some disruption (ratings of 4–5), and 22 percent described the process as disruptive (ratings of 1–3). The main comment made here, by 12 percent of the principals responding, was that staff had felt stress as a result of the process.

The larger the school, the least disruptive the review process (ranging from 27 percent of G1 principals reporting disruption to 17 percent of G5 principals).

Perhaps surprisingly, principals who experienced a discretionary review were more likely to rate the review as having no noticeable effect than others (46 percent compared to 27 percent overall).

Principals whose review teams had come from the Nelson and Napier ERO offices were more likely than others to describe the process as disruptive (40 percent and 30 percent).

Was the input of all school staff equitably accessed and valued by the ERO team doing the school review?

Thirty-four percent of the principals responding felt their staff had all been involved in the review process (ratings of 8–9 on the 9 point scale), 23 percent felt that most had (ratings of 6–7), 17 percent felt that some had been missed out (ratings of 4–5), and 26 percent felt that all the staff had not been as involved in the review process as they should be.

Again, principals whose review team consisted of a single reviewer showed more satisfaction with the process than others. Fifty-two percent of these principals thought the review process had adequately included all staff, compared to 34 percent of those who had had 2-member review teams,

26 percent of those who had had 3-member review teams, and 24 percent of those who had had 4-member review teams.

Review teams sent out by the Christchurch ERO office were most likely to receive the highest ratings for staff inclusion in reviews (60 percent); Auckland, Wellington, and Dunedin most likely to receive the lowest ratings (34–35 percent).

After the review was completed, did principals feel that they had in fact known what would happen during the process, and what would be required of them?

Thirty-seven percent of the principals responding said they had indeed had a full understanding of the requirements of the review before it occurred (ratings of 8–9 on 9 point scale). Thirty-one percent felt they had understood most of what would be required (ratings of 6–7), and 18 percent had understood some of what would be required (ratings of 4–5 percent). Seventeen percent felt they had really had no understanding at all.

Principals who thought they had been ill-informed about the material they needed to assemble for their review were least likely to feel they had fully understood what would happen, in hindsight.

Teaching principals, principals in remote schools, and those whose schools had rolls of less than 160 were also less likely than others to feel they had fully understood the review requirements.

Principals whose school had a discretionary review were most likely to feel they had fully understood the requirements for that review (46 percent compared with 35 percent for those whose schools had assurance audits or effectiveness reviews).

There was no clear pattern associated with the number of ERO reviewers in the team—those with 1 reviewer and those with 4 were just as likely to feel they had fully understood the review requirements before the review happened (25 and 29 percent respectively), but less so those with 2 or 3 reviewers on their team (36 and 44 percent respectively).

Principals whose review teams came from the ERO Wanganui office were more likely than others to feel they had had no prior understanding of what their review would entail (32 percent).

Quality of Draft and Final Review Reports

Few principals and their school's board of trustees were surprised by the draft report of their ERO review: only 9 percent found it contained a lot of surprises (ratings of 1–3 on the 9 point scale). The draft report contained no surprises whatsoever for 43 percent of the principals, and almost no surprises for a further 23 percent (rating of 8). There were some surprises for 16 percent of the principals (ratings of 6–7), and quite a few surprises for 9 percent (rating of 4–5).

Interestingly, twenty percent of the principals who carried out their own school self-review said there was absolutely no difference between the findings of their own review and that done by ERO, with another 40 percent finding only slight differences (ratings of 2–3 on the 9 point scale). Nineteen percent found some differences (ratings of 4–5); 13 percent found a lot of difference (ratings of 6–7), and 9 percent found major differences (ratings of 8–9).

Principals of schools with rolls under 160 were less likely than others with higher rolls to report no difference between their self-review and the ERO review.

Only 9 percent of the principals thought their draft review report was completely accurate (a rating of 9 out of 9), a further 27 percent thought it was nearly but not completely accurate (a rating of 8 out of 9). Thirty-five percent thought there were gaps (ratings of 6–7), 17 percent thought there

were quite a few inaccuracies (ratings of 4–5), and 13 percent thought the draft report was inaccurate.

Thirty-seven percent of the principals who conducted their own school self-review rated the report completely or nearly completely accurate compared with 25 percent of those who did not conduct their own self-review.

Eighteen percent of the principals did not answer the question which asked whether ERO had made the changes to the draft report requested by the school, indicating that they had asked for no changes.

Of those who did request changes, 31 percent said all the school's requested changes had been made for the final report. Thirteen percent of the principals had had almost all their requests for change made, 13 percent had had most requests fulfilled (ratings of 5–6 on the scale), 7 percent had some changes made (ratings of 4–5), 10 percent a few changes, and for 24 percent, none of the changes requested had been made.

Principals in the largest schools (over 450 students) were most likely to have had all their changes accepted (54 percent). Principals in rural or remote schools were less likely than others to have had all their requested changes made to the draft report, as were teaching principals. Principals who had experienced 3 or more reviews were less likely than others to have sought changes to the draft review.

Did the principal feel that the work of the people at the school—principal, staff, and board—had been adequately recognised in the final report?

Thirty-six percent of the principals felt their work had been well recognised (ratings of 8–9). Twenty-five percent felt that most of their work had been recognised (ratings of 6–7), 16 percent that some of their work had been recognised (ratings of 4–5), and 23 percent felt their work had not been at all adequately recognised.

Principals who carried out their own self-review were more likely to think that their school's work had been well recognised than those who did not (39 percent compared to 18 percent).

There were also some differences related to different district ERO offices: principals whose schools were served by Hamilton, Rotorua, or Napier offices were less likely than others to feel their work was not at all adequately recognised (8–16 percent), and those served by Dunedin and Wanganui offices were most likely to feel their work was not adequately recognised (34–38 percent).

Usefulness of the Final Report

Did the final report help people working in schools to set their future goals? Nineteen percent of the principals found their ERO report extremely valuable in assisting them to set goals for the future (ratings of 8–9). Thirty-one percent found it valuable (ratings of 6–7). Twenty-one percent found the ERO report of some value (ratings of 4–5), and 29 percent found it of no value (ratings of 1–3).

The smaller the school, the more likely that the ERO review helped in the development of future goals (29 percent in schools less than 60 students finding is extremely valuable, falling to 10 percent of those in schools with rolls over 450).

Had the final report and ERO's recommendations helped to improve the children's learning at the school? Fifty-one percent of the principals thought it made very little contribution (ratings of

1–3 on the 9 point scale). Twenty percent thought it had made some difference (ratings of 4–5), 19 percent that it had made quite a difference, and 11 percent, that it really helped a lot.

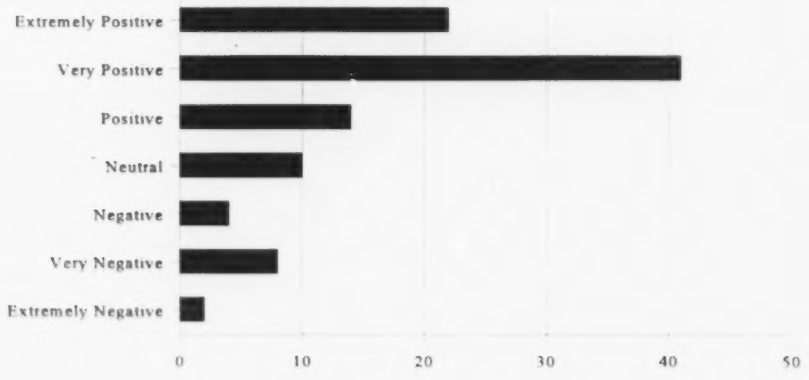
These results may be explained by the fact that few of the ERO reviews were negative—in other words, great changes were not suggested; it could also be explained by the fact that much of the material covered by the assurance audits involves legislative compliance that is often seen by school staff and boards as having little relation to the quality of children's learning.

Teaching principals, and principals in rural and remote schools, were twice as likely as others to find the ERO recommendations very helpful in improving their children's learning.

And how well did the schools represented in this survey do on their ERO reviews? Only 14 percent of the principals reported negative reviews, *see* Figure 2.

Figure 2

School Rating of Final ERO Review Report



Fewer teaching principals reported extremely positive reviews (36 percent compared with 46 percent of teaching principals). Principals who conducted their own school self-review were twice as likely as those who did not to report extremely positive final reports (45 percent compared with 20 percent).

Conclusions—Mixed Views About ERO and the Reasons for them

Although most schools do not do badly on their final ERO reports, principals have mixed feelings about the value of ERO reviews. This is shown in Table 1 which compares the average ratings of the process, review teams' quality, work involved, and the impact of the completed review report.

Table 1

Average Ratings given to Aspects of ERO Reviews by Principals

Draft report contained no surprises for school	7.4
ERO team conduct was highly professional	7.2
Final report was extremely positive	6.7
ERO team had consistent interpretation of requirements	6.6
ERO team did a sufficient check of school documentation	6.5
Draft report was completely accurate	6.4
ERO team had sufficient knowledge of curriculum	6.4
In hindsight, school had full understanding of ERO review requirements	6.3
ERO team had full understanding of school's characteristics	6.1
ERO team used input of all staff	6.0
ERO team gave school staff and board adequate recognition in final report	5.9
ERO team had sufficient understanding of school needs or problems	5.8
The review process had no noticeable effect on the school	5.7
School's requested changes were all incorporated into final report	5.6
The review process was positive for school staff	5.4
School had to assemble much extra material and information for ERO review	5.3
ERO report assisted school in setting future goals	5.2
ERO team spent enough time with children to verify final report statements	4.9
ERO recommendations assisted in improving children's learning	3.9
Major differences existed between school self-review and ERO report	3.6

(Lowest 1, highest 9, theoretical average 4.5)

None of these average ratings is in the highest performance bracket (8–9 on the 9 point scale). The top 5 items do indicate that many ERO review teams do their work in a professional, consistent manner. But the bottom 5 items raise questions about whether reviews are as useful to schools as one might have expected, and whether their form could be altered. Partially as a result of previous reviews and their own self-review, many schools have the documentation required by ERO, so this aspect is not in itself necessarily time-consuming. But not many schools are gaining new insight from the reviews to improve children's learning, or even for future planning. The ERO review is not providing them with a different picture from their own self-review.

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Does this matter? Judging by the comments that most principals made at the end of the survey, it does. While ERO may be charged with furnishing government with an audit of how well schools are meeting their legislative requirements, many principals see such audits as "superficial" (*"flick and tick"*) "artificial", and because of the now wide scope of legislative requirements, often entering into the realm of "trivia", or focused on aspects of their work which principals feel have been imposed on schools and which distract their energy from their core purpose of teaching children.

In one sense, then, principals would like the reviews to be more substantial and to focus more on the work of the school—but only if the criteria used for the reviews are widened. A common complaint amongst the comments was that ERO focused "on the negative". Their role was to find weaknesses, not strengths. Unless the review team contained people who had previously reviewed the school, efforts to improve the school could go unrecognised. Nor did some reviewers take into account the newness of school staff or board members: the particular circumstances of each school. Such an approach runs counter to the more supportive approach, building on strengths, which is common in New Zealand schools.

Indeed, the survey data indicate that ERO reviews do not always have the intended results. Principals who reported that their school received a negative or very negative report were less likely than others to think that the recommendations or report would improve children's learning, or help them to set their school's future goals.

Principals at these schools were also more critical than others of their review team's curriculum knowledge, their checking of documentation, the amount of time they spent with children and staff to verify their final conclusions, their conduct of the review, and the accuracy of the draft. Those who carried out their own self-review found more discrepancies between the results of that review and the ERO review than did principals who had more favourable ERO reviews.

Of course, these views may simply express disappointment in the final result. But equally, and in the light of the next section probably more likely, they may point to differences in the quality of ERO reviews and reviewers; and to differences between what is important to schools, their focus in the self-review, and what is important to ERO.

Respect for the quality of the review team certainly makes a difference in terms of principals' views of whether the ERO recommendations would have a positive effect on children's learning: 44 percent of those who rated their review team's curriculum knowledge as adequate or near adequate thought the review would have a positive impact, compared to 7 percent of those who rated their review team's curriculum knowledge as out of touch.

Principals were also more likely to report that the review had helped their future planning if the review team was knowledgeable about curriculum: 36 percent of those who found their reviewers had a sufficient knowledge of curriculum found the review report very helpful in setting their future goals, compared to 4 percent of those who gave their review team a rating of 5 or less on their curriculum knowledge. Review teams who were seen to have spent time with children, to conduct their review professionally and fairly, and to have made few inaccuracies in the draft report were also more likely to have a positive impact on schools' future planning and children's learning.

How consistent are the ERO reviews? It would seem from the principals' answers and their comments that inconsistencies do exist between teams and between offices. The number of those who wrote positively about their ERO reviewing team was matched by those who found them lacking in appropriate experience, credibility, and interpersonal skills, and producing inaccurate

reports. There were accounts of ERO reviewers insisting that something was required, contrary to the official advice of the Ministry of Education, or, on matters of health and safety legislation, contrary to advice from other government departments or lawyers. Some ERO reviewers are highly respected by the people they review for their curriculum knowledge; others are regarded as completely out of touch. If their review reports judge schools on the basis of out of date knowledge, they are also seen as not only unfair, but dangerous for the school.

Principals noted in their comments that the ERO review was a stressful experience. Staff and board members often felt under pressure. Principals expressed concern about the immediate disruption of school life and children's learning (particularly when ERO reviewers interviewed teachers as they were teaching). But their deeper concern was with the anxiety ERO visits produce as a result of the final report being made publicly available: a final report which focuses on weaknesses rather than strengths is vulnerable to being misreported by the media due to only parts of the report being covered. A less than complimentary headline such as "School Unsafe" may be built from only a few areas of minor noncompliance with legislation.

This concern for the quality of the final review and its possible (mis)use by the media is also understandable in the light of the inconsistencies reported and some inaccuracies which principals cannot always get corrected between the draft and final reports. There is enough concern about consistency in this survey to indicate the need for a more detailed analysis of the consistency of ERO reports, since these are used not only to examine the performance and quality of individual schools, but also provide the source for the aggregated information and analysis of the performance and quality of the system as a whole, through such means as the ERO education evaluation studies or public comments by the ERO Chief Review Officer.

In their comments, the principals' concerns over the ERO reviews far outweighed their positive experiences of review teams. Put together with the data from this survey they give rise to a set of questions:

- How consistent are the ERO reviews?
- If the inconsistencies are as widespread as this survey would suggest, what reliability do the ERO reviews have?
- Principals are more likely to take notice of reviews and recommendations made by reviewers whose curriculum knowledge they respect, whose conduct of the review was thorough, professional, and fair. How can the quality of ERO reviewers be improved overall so that ERO reviews and recommendations can have a positive impact for schools?
- Does the fact that ERO reviews occur spur self-review or the focus on whole-school development and review (to which ERO has made a useful contribution) now reached the stage where the form of outside review could change?
- Would it be more useful to concentrate the limited resources available for reviewing schools by ending assurance audits, using a self-report process building on the Board Declaration already developed by ERO with random checks done, as is now done for school roll returns? This would allow a focus on effectiveness reviews and providing support to those schools identified from the effectiveness reviews as needing it.

- Can common ground be found between ERO's approach to effectiveness reviews and principals' desire for something which recognises school progress and strengths other than academic performance, such as children's behaviour, and responsiveness to the local community?

- ERO reviews and the recommendations arising from them are very helpful to some principals and schools—often new principals, principals in rural or remote areas, or principals coming to troubled schools. What would need to change for other schools for the reviews to be more useful? Are the reviews simply less informative (even if confirmatory) for experienced principals in schools which are running well and whose communities are satisfied with the current quality of learning? Should reviews be regarded as an important source of new knowledge about curriculum and teaching approaches?

- Although most schools get positive ERO reports, the possibility of the media publication of ERO reports is the source of pressure in many schools. To date, there has been no research funded (though proposals have been made) to look at what impact publication of ERO school reviews has on schools and whether it does spur schools to make improvements which are of value to their students. Does the benefit of publication in the media outweigh the cost? Should ERO reviews be made public and released to the media? If the ultimate goal of school reviews is to improve the quality of students' learning, is it in fact more productive for review teams to work privately with schools?

Appendix 1

Representativeness of Survey Responses

	Survey (n=602) %	Ministry of Education 1996 National Figures (n=2250) %
Location[1]		
City	38	46
Rural	43	39
School Roll		
9–20	6	5
21–60	16	20
61–100	14	13
101–160	12	13
161–240	18	16
241–350	17	16
351–450	10	9
451–600	6	6
> 600	2	1
Proportion of Maori Enrolment		
less than 8%	22	23
8–18%	21	28
15–29%	25	17
>30%	33	33
School Type		
Full primary	51	53
Contributing	41	40
Intermediate	6	6
School Ownership		
State	90	90
Integrated	9	10

[1] The location numbers do not add up to 100 percent as this analysis is comparing only city and rural locations. The other location categories used in this questionnaire did not quite match the location categories of the national figures. All figures have been rounded up or down.

Appendix 2

Questionnaire

NEW ZEALAND PRINCIPALS' FEDERATION SURVEY
THE EDUCATION REVIEW OFFICE PROCESS

1 What is the Grade of your school?
G1{ } G2{ } G3{ } G4{ } G5{ } G5+{ } Other{ }

2 The roll of your school is between.....
9 - 20{ } 31 - 60{ } 61 - 100{ } 101 - 160{ } 161 - 240{ } 241 - 350{ } 351 - 450{ }
451 - 600{ } Over 600{ }

3 Your school is..... Tick the most appropriate please
Full Primary{ } Contributing Primary{ } Intermediate{ } Form 1 - 7{ } Area/Composite{ }
Area{ } Secondary{ } Kura Kaupapa{ } Immersion{ } Special{ }

4 Your school is.....
State{ } Integrated{ } Private{ }

5 What % of the pupils at your school are: - (please answer all categories)
Maori{ } European { } Pacific Islanders{ } Asian{ }

6 Are you a..... Tick the most appropriate
Teaching Principal{ } Non Teaching Principal{ }

7 What Decile Ranking is your school?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9 or 10{ }

8 Tick One.
What has been the staff turnover at your school over the past 12 months?
0%{ } 10 - 20%{ } 20 - 40%{ } 40 - 60%{ } 60 - 80%{ } 80 - 100%{ }

9 The ERO Office responsible for your last review/audit was?
ERO Office was _____

10 Which month did you last have your ERO Review or Audit in..
Month: -- _____

11 Your last ERO Review was.....
Effectiveness{ } Assurance{ } Discretionary{ } Voluntarily{ }

12 Your school is situated.... (Please tick the most appropriate)
In a city{ } In a large town{ } In a small rural township{ } Totally rural{ }
Rural classified as remote{ }

13 The number of ERO Officers involved in the process was....
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } More than 8{ }

14 Please tick one answer only. Ranked. 1 = very little 9 = a lot
How much extra data and written information did your school need to compile prior to your last Review at the request of ERO?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

15 Please tick one answer only. Ranked. 1 =not at all. 9 =totally clear
How well informed were you, prior to the Review, of what records/data would be required by the ERO Team?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

16 How many ERO Reviews, either Assurance or Effectiveness have you had in the last 4 years?
1{ } 2{ } 3{ } 4{ } More than 4{ }

17 How much additional time was required by you to prepare, process, copy the requested records/data.?
No extra time{ } 1 - 10 hrs{ } 11 - 20 hrs{ } 21 - 30 hrs{ } 31 - 40hrs{ } 41 - 50hrs{ } 51 - 60 hrs{ } Over 60 hrs{ }

18 Did the ERO Team request access to CONFIDENTIAL Staff Appraisal Notes
Yes { } No{ }

19 Did you supply CONFIDENTIAL Staff Appraisal Notes to ERO?
Yes{ } No{ }

20 Please tick one. Ranked. 1= Total access 9 = No Access
Would you give an ERO Team access to Confidential Staff Appraisal Notes information, IF staff have participated on the understanding that these notes would be treated as confidential by you?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

21 Tick one. Ranked. 1 = Very little time 9 = More than sufficient
In your opinion, did the ERO Team spend sufficient time with children to be able to accurately verify their statements as found in their final report?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

22 Tick only one. Ranked. 1 = Not convinced they did 9 = Convinced they did
In your opinion, did the ERO Team check sufficiently the details of the documentation supplied by the school?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

23 Tick only one. Ranked. 1 = Not equitably involved 9 = Equitably involved.
In your opinion, was the input of all staff equally accessed and valued by the ERO Team?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

24 Tick one. Ranked. 1 = Definitely not. 9 = Very high recognition
In your opinion, did you, the Board, and your staff feel that their work received adequate recognition in the final report?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

25 Tick One. Ranked 1 = Very Little9 = Really helped a lot.
In your opinion, did the recommendations/requirements made by ERO, assist with improving the actual learning of the children in your school?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

26 Tick One. Ranked. 1 = Negative 9 = Positive
In your opinion, what effect did the review process have on yourself and your staff?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

27 Tick One. Ranked. 1 = Disruptive 9 = No noticeable disruption
In your opinion, what effect did the Review Team have upon your school, during the ACTUAL REVIEW PROCESS?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

28 COMMENTS in relation to Question 27. (Please keep ALL comments 15 letters or less so we can computer analyse them)
Your Comments are: - _____

29 Tick One. Ranked. 1 = Appeared to be out of touch. 9 = Appeared to have sufficient level of knowledge.
In your opinion, did the members of the Review Team have a sufficient knowledge/experience of current curriculum practice and school management?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

30 Tick One. Ranked. 1 = Appeared to be out of touch. 9 = Appeared to have sufficient level of knowledge.
In your opinion, did the members of the Review Team have a sufficient understanding of the problems, needs of your school and children?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

31 In your opinion, was the composition of the ERO Team appropriate for the ethnic make up of your school?
Yes{ } No{ }

32 COMMENTS in relation to Question 31. (Please keep ALL comments 15 letters or less so we can computer analyse them)
Your Comments are: - _____

33 Tick One. Ranked. 1 = Unprofessional. 9 = Highly Professional
In your opinion, did the ERO Team conduct the Review in a professional, balanced and fair manner?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

34 COMMENTS in relation to Question 34. (Please keep ALL comments 15 letters or less so we can computer analyse them)
Your Comments are: - _____

35 Tick One. Ranked. 1 = Not of assistance. 9 = Extremely valuable
In your opinion, did the ERO Report assist your school in setting future goals?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

36 Tick One. Ranked. 1 = No understanding. 9 = Full understanding.
Before the Review process, in hindsight, did you fully understand what would be happening & required during the Review Process?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

37 COMMENTS in relation to Question 36. (Please keep ALL comments 15 letters or less so we can computer analyse them)
Your Comments are: - _____

38 Tick One. Ranked. 1 = Not consistent 9 = Consistent
In your opinion, did the Review team have a consistent interpretation of requirements on aspects such as curriculum and policy requirements.
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

39 Tick One. Ranked. 1 = Not at all 9 = Full Understanding
In your opinion did the ERO Team fully understand the unique characteristics of the school and took these into account in their report?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

40 COMMENTS in relation to Question 39. (Please keep ALL comments 15 letters or less so we can computer analyse them)
Your Comments are: - _____

41 Tick One. Ranked. 1 = Inaccurate 9 = Completely accurate
In your opinion, how accurate and valid was the Draft Report received by your school from ERO?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

42 Tick One. 1 = No changes at all. 9 = All that were requested.
If you requested changes to be made to your Draft report, were these accepted as valid requests and the changes made in the Final report?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

43 Comments in relation to Question 42. (Please keep ALL comments 15 letters or less so
we can computer analyse them)
Your Comments are: - _____

44 Tick One. Ranked. 1 = Full of surprises. 9 = No surprises
In your opinion, were there things in the Draft report that were a total surprise to you and or your staff and Board?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

45 Comments in relation to Question 44. (Please keep ALL comments 15 letters or less so we can computer analyse them)
Your Comments are: - _____

46 Do you carry out a Self Review Process at least once per year?
Yes{ } No{ }

47 Tick One. 1 = No difference. 9 = Major differences
In your opinion, did your Final report differ greatly from the findings of **your Self Review**?
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

48 Tick One. Ranked. 1 = Extremely negative. 9 = Extremely Positive
In your opinion, your Final report was.....
1{ } 2{ } 3{ } 4{ } 5{ } 6{ } 7{ } 8{ } 9{ }

49 GENERAL COMMENTS:- The following spaces are to allow you to make General Comments, re ERO. Please keep each response to 15 letters or less, and each comment should be on a separate idea.

Your first comment is: - _____

Your second comment is: - _____

Your third comment is: - _____

50 ADDITIONAL COMMENTS: - Use the box below to make comments in more detail than what is allowed in the comment areas above.

Your Comments:-

Thank you for spending a few minutes of your time filling in this survey.

We need a HIGH RESPONSE rate to this survey, so your response is important!

Please **post** your filled in survey to:-
New Zealand Principals' Federation Head Office

Box 27296 Wellington